

State of Wisconsin
Department of Administration

**User Guide for Information Technology
(IT) and Private Consultant Services
Purchasing over \$150,000**

Job Aid: 150K System User Guide

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Note: If you have a pop-up blocker installed in your browser, be sure that it is turned off while filling out the information for the creation of your request. If you click the back button in your browser with the pop-up blocker on, you may not be prompted to save your progress, which could result in losing information you had previously entered.

Note: You will be automatically logged out after your screen has been idle for 20 minutes. Be sure to save your information often to avoid losing anything.

ACCESSING THE 150K SYSTEM

At this time, the Information Technology (IT) and Private Consultant Services Purchasing Over \$150,000 System, or 150K System, is only available to State agencies.

➤ **STEP 1:** Sign up for an account.

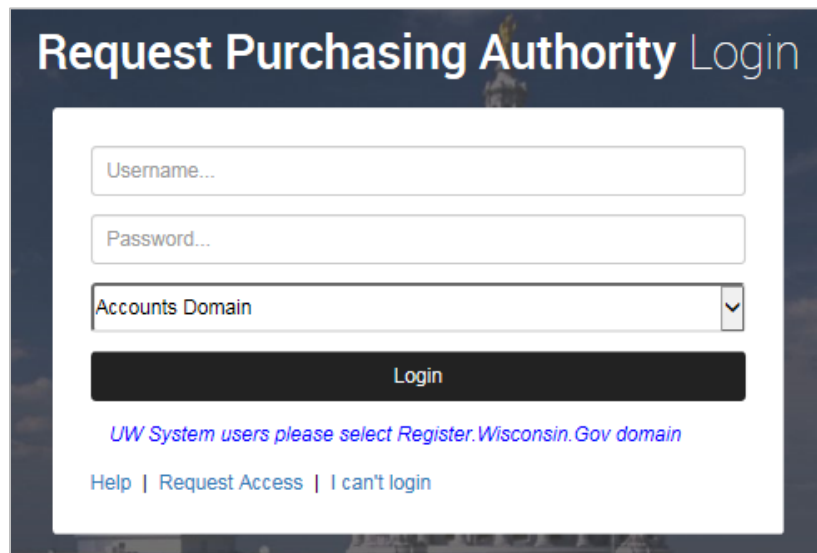
To access the 150K System, you will need to first sign up for an account. To do this, send an email to DOAWisPro@wisconsin.gov with the following information:

- Your name
- Your IAM username
- The name of your agency
- Be sure to reference “150K System” in your email

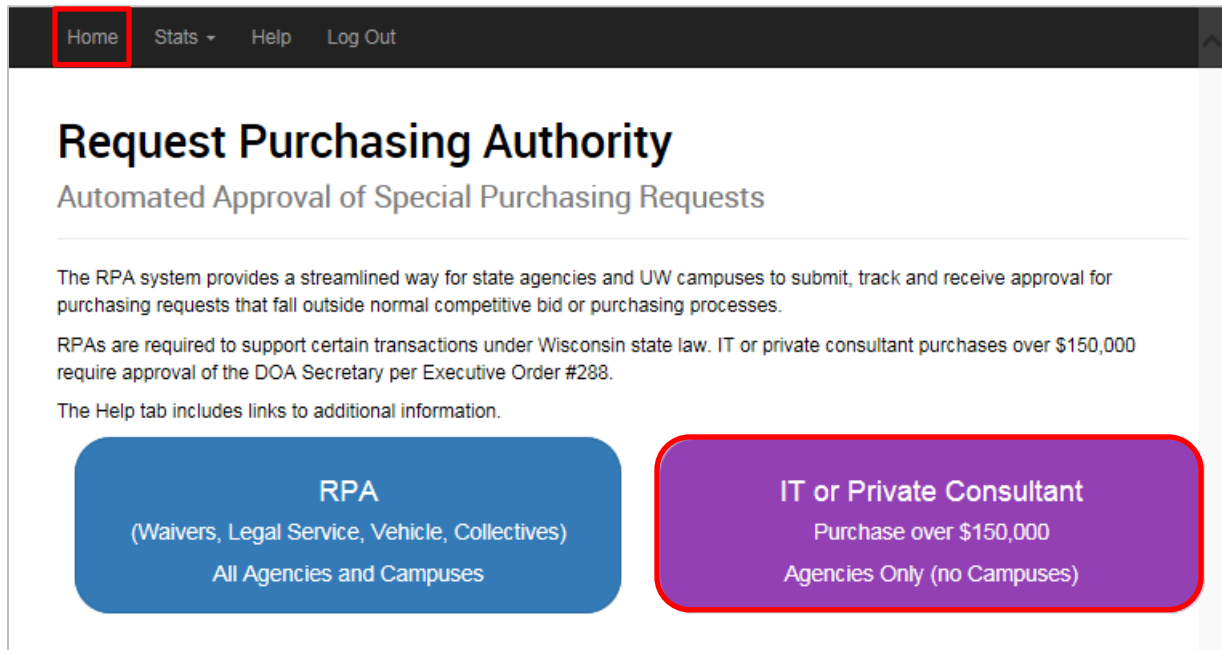
A 150K System administrator will confirm that you should have access to the system and will email you when your account is set up.

➤ **STEP 2:** Login to your account.

Navigate to the website at <https://rpa.wi.gov> and login with your IAM username and password and make sure **Accounts Domain** is selected from the dropdown menu.

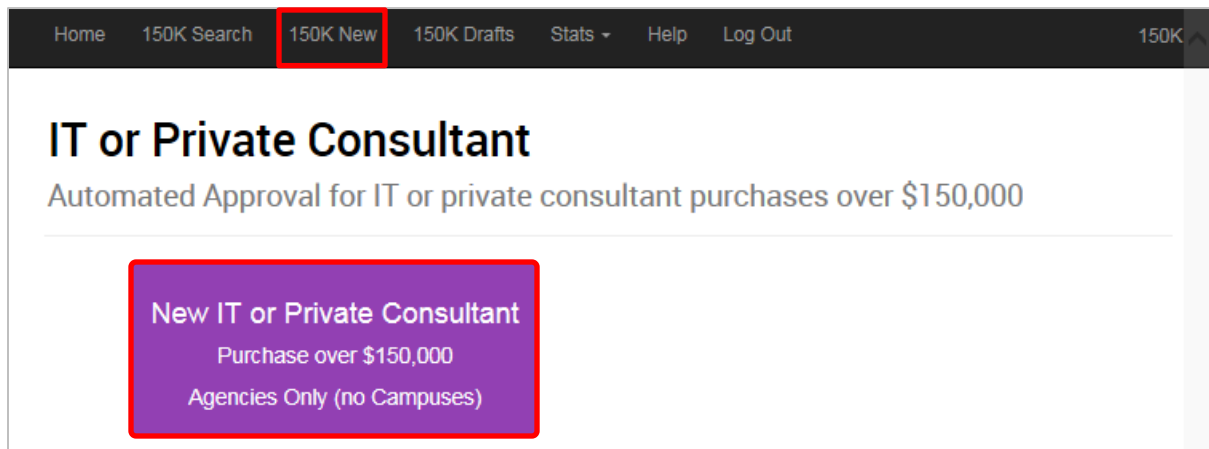


Once you’ve successfully logged in, you will be taken to the combined RPA Automation and 150K System homepage. If you have access to both systems, you will see both the RPA and 150K system buttons (as seen on the following page); if you only have access to one of the systems, you will only see the button for that system. For the purpose of this guide, we will focus exclusively on the 150K System.



To return to this page at any time, click the **Home** tab at the top of the window. Click the purple button labeled **IT or Private Consultant Purchase over \$150,000**.

CREATING A NEW REQUEST



- **STEP 1:** Navigate to the 150K System homepage, as seen above. Click the **IT or Private Consultant Purchase over \$150,000** button or click the **150K New** tab at the top of the page. This will open the Add New 150 K Request form.
- **STEP 2:** Fill in the required information. All required fields with missing information will be initially displayed in red. As you complete these fields, they will turn black.

Add New 150K Request

Request

Enter the request basics. Once you fill out this form you can save it as a draft so you can come back to it later.

Agency ?
--please select--

Required

Program Contact ? **Contact Phone** ? **Contact Email**

Required Required Required

Request Flags ?

- Non Information Technology Request
- Non Private Consultant
- Non Renewal

Hover over any ? symbol to learn more about the field indicated.

- **Agency:** Select the agency the request is for.
- **Program Contact, Contact Phone, and Contact Email:** List full name, phone number, and email address of the person who should be contacted if there are questions about the request.
- **Request Flags:** Select any applicable request flags. The flags are off by default (as seen above) and will turn green when they are clicked.
 - **Information Technology Request:** Select this flag if your request is for IT. Clicking the IT Request flag will display a number of subcategories, including Hardware, Software, Professional Services, Telecom, and XaaS.
 - **Professional Services:** Selecting this will display a dropdown menu that will allow you to further indicate the category of professional service (as seen on next page).
 - **Private Consultant:** Select this flag if your request is for a private consultant. There are no additional subcategories to select for this flag.
 - **Renewal:** Select this flag if you are asking for your request to be renewed. There are no additional subcategories to select for this flag.

Request for Information Technology Services

IT Subcategory(s)

Hardware

Software

Professional Services ⓘ

Telecom

XaaS

✘ Non Private Consultant

✘ Non Renewal

Professional Services Category(s)

—please select—

IT Business Relationship Management

Enterprise Architecture

IT Demand and Portfolio Management

Infrastructure Development and Deployment

Application Innovation Development and Deployment

Application Update Development and Deployment

Information Data Sourcing and Integration

Data Center Management/Storage & Compute

Network Management

IT Ops Management

Service Desk/Help Desk

End User Device Support

Application Support

Risk and Security Management

Information and Data Management

Other

Procurement Authority

—please select—
▼

Required

Contract Number(s) ⓘ

Renewal Option ⓘ

Required

Contract Term

—please select—
▼

Required

Funding

—please select—
▼

Required

If you select **Other** from the dropdown menu, you will be able to further explain in an additional text box.

- **Procurement Authority:** Use the dropdown menu to select the procurement authority this request.
- **Contract Number(s):** Enter the applicable contract number.
- **Renewal Option:** Enter the renewal option (for example, “None” or “After 1 year”).
- **Contract Term:** From the dropdown menu, select the contract term. If you select **Other**, you will be required to enter additional information.
- **Funding:** Use the dropdown menu to select the type of funding. Selecting **Other** will require you to enter additional information (for example, “50% SEG-L and 50% PR-O”).

Service/Commodity Description

Required

NIGP Codes ⓘ

type here to search for NIGP codes by number or description


There are errors on the form. You must correct them before saving.

Save & Continue →

- **Service/Commodity Description:** Use the text box to enter a description of the service or commodity the request is for.
- **NIGP Codes:** Enter the applicable NIGP codes by entering a number or keyword into the search bar and selecting the applicable search results. To delete a selected code, click the red trash can symbol to the right of the code description.

NIGP Codes ⓘ

type here to search for NIGP codes by number or description

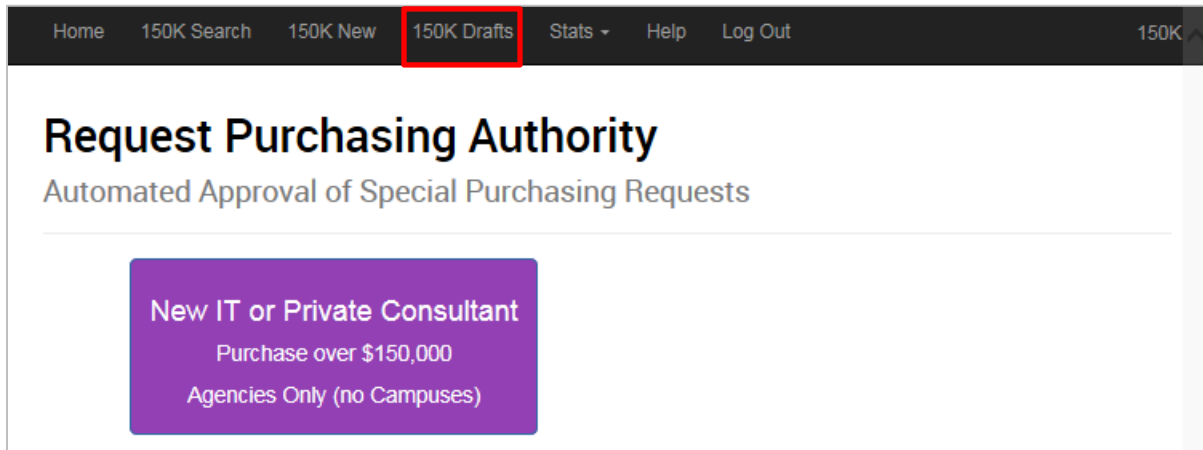
28029 Communications/Telecommunications Cable and Wire 

- **Save & Continue:** Click to save your work and continue to the next portion of the request. Before you will be allowed to save, you must complete all required fields. Once you've saved your request, you will have access to additional tabs at the top of your screen which will allow you to complete your request. It is not necessary to complete all steps at this time – you may return to work on the draft at a later date by selecting **150K Drafts** from the top toolbar (as seen on next page).

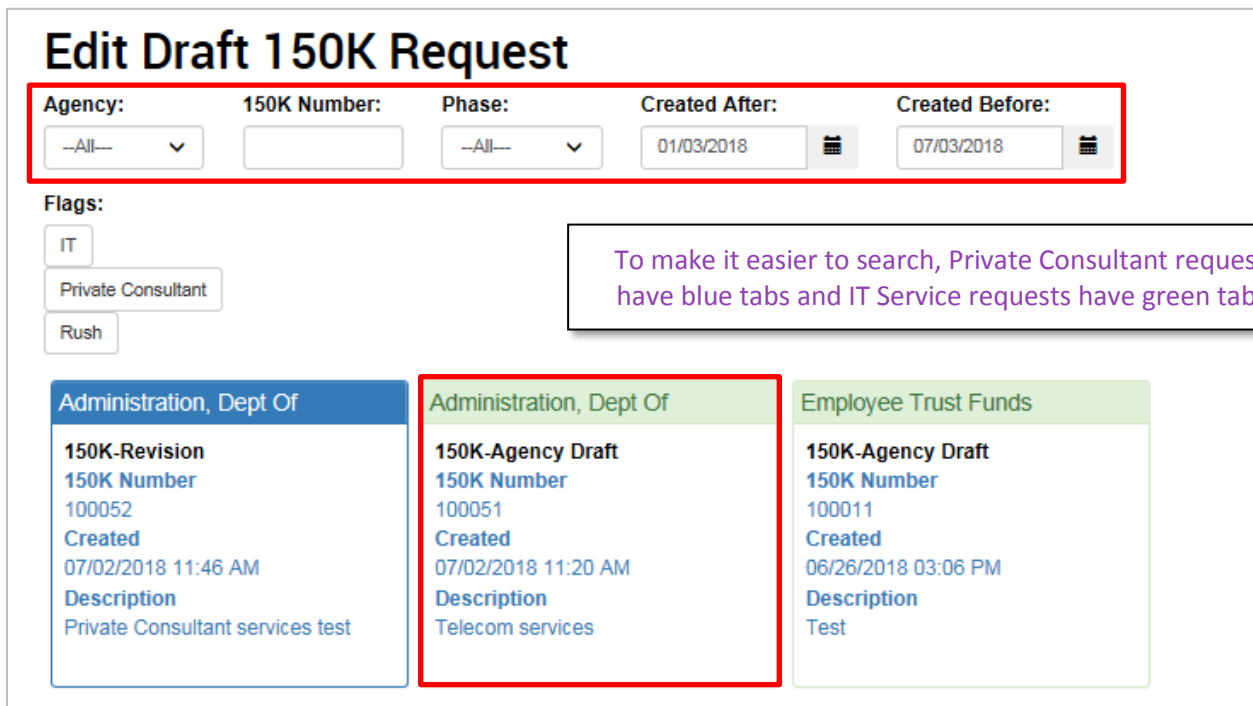
EDITING AGENCY DRAFTS & AGENCY REVISIONS

If your request has been created but hasn't yet been submitted for approval, it is in the **150K Agency Draft Phase** and may be accessed via the **150K Drafts** tab. You may edit your draft multiple times before submitting it. If you have already submitted your request for approval and it has been returned for revisions, it is in the **150K Revision Phase**. Drafts in the **150K Revision Phase** must be updated before they can be resubmitted.

- **STEP 1:** Navigate to the 150K System homepage. To find your saved draft, click the **150K Drafts** tab at the top of the page.



- **STEP 2:** Select the draft you'd like to work on by clicking anywhere within the **description box**. If needed, you can use the various filters at the top of the page to narrow your search.



- **STEP 3:** Edit your draft. Once you've created your initial request, you will have access to several new tabs to edit. All tabs in red must be completed before you will be able to submit your request for approval.



- **Request:** Returns you to the form you initially filled out and allows you to update the information listed.
- **Vendors:** Enter the information for any vendors associated with this request and click **+ Add Vendor to List**. To remove a vendor, click the **Remove Vendor** button. Click **Save & Continue** to proceed to the next tab. You may enter multiple vendors, a single vendor, or you may leave the field blank if you don't yet know the vendor(s).
 - Note: If you need to enter multiple vendors, you may select **Various** from the **State** dropdown menu and click **+ Add Vendor to List** without providing additional information in the form. You will then be expected to upload a document with the vendors' information in the **Documents** tab.

Draft 150K Request

Request **Vendors 1** Prior Years 0 Estimates 0 Documents 0 Finish Notes 0 Print

List this request's vendors. If this request is sole source the list will have one vendor. If you don't know the vendors the list will have zero vendors.

Fill All Fields to Add Vendor

Name

Address

City **State** **Zip**

 -choose state-

+ Add Vendor to List

Vendor 1 **Remove Vendor**

Name

Address

City **State** **Zip**

 Various

Have a lot of vendors to add? Select **Various** from the **State** dropdown menu and upload a document with your full vendor list.

← Back **Save & Continue →**

- **Prior Years:** List the data range and total expenditures for this request for any prior years and click + **Add Prior Year to List**. To delete an entry, click the – (**minus**) button to the right of the entry. If this request hasn't been made before, this page may be left blank. Click **Save & Continue** to proceed to the next tab.

Draft 150K Request

Request Vendors 1 **Prior Years 1** Estimates 0 Documents 0 Finish Notes 0 Print

List this request's prior years. If this request hasn't been made before the list will be empty.

Fill All Fields to Add Prior Year

Date Range

Total Expenditure **+ Add Prior Year to List**

Prior Year List

Date Range	Expenditure
07/01/17 - 07/01/18	287,000 -

← Back **Save & Continue →**

- **Estimates:** Enter your best estimate for the cost of the request for a year. You must enter an estimate for at least one year. In some cases, the estimate may be \$0. Once you add **Year 1 Purchase Estimate** and click + **Add**, you will have the option to enter information for additional years. To delete an entered estimate, click the – (**minus**) button. Click **Save & Continue** to proceed to the next tab.

Draft 150K Request

Request Vendors 1 Prior Years 1 **Estimates 1** Documents 0 Finish Notes 0 Print

You must estimate the cost of this request for at least 1 year. Estimates can be 0.

Add Year 2 Purchase Estimate

\$ 0 **+ Add**

Year 1 \$ 275,000 **-**

← Back **Save & Continue →**

- **Documents:** Click the **Document Type** dropdown list and indicate what type of document you will be uploading. Once selected, then click the **Select Document +** button to choose the document from your computer and upload it. Once it has been successfully uploaded, you will see the document name, type,

and a button to **Delete** the file, if needed. You must upload the DOA-3310 Request Form before you will be able to submit your request. Click **Save & Continue** to proceed to the next tab.

Draft 150K Request

Request Vendors **1** Prior Years **1** Estimates **1** **Documents 1** Finish Notes **0** Print

You can find blank forms here: [Procurement Forms](#)
Fill them out on your computer. Attach the completed version.

Document Type: --please select-- Select Document +

Document	Type	Delete
CBA.pdf	CBA_CA	Delete

Missing Required Documents: • Request_Form_DOA_3310 •

← Back Save & Continue →

- **Finish:** Once you are done entering all the information into the system, clicking on the **Finish** tab will allow you to submit your request for approval.
 - If you have not entered all of the required information, you will see a red error message letting you know which steps still need to be completed, and the tabs with missing information will also be shown in red. You may still withdraw your request at this time, but you will be unable to submit for approval until all requirements are complete.

Draft 150K Request

Request Vendors **1** Prior Years **1** Estimates **1** **Documents 1** **Finish** Notes **0** Print

This request is incomplete. You must correct the following errors before you can submit it:
There is an error on the Documents tab

Withdraw Request

- If you have entered all the required information, you will see a green confirmation message at the top and will have the option of clicking **Submit Request**. Please note that you will not be able to edit the request after you submit it. If you no longer want to submit your request, you can click **Withdraw Request**.

Draft 150K Request

Request Vendors 1 Prior Years 1 Estimates 1 Documents 2 **Finish** Notes 0 Print

Request is complete and ready for submission. You can't edit the request after you submit it. It won't be in drafts anymore.

Requests must be signed by the agency's signatory and certify that the request meets all applicable requirements. This certification is required for all requests. Attach a completed and signed copy of the request.

Once you click **Submit Request** or **Withdraw Request**, your request is *immediately submitted or withdrawn*. There are no additional confirmation windows.

Submit Request **Withdraw Request**

- When you have successfully submitted your request, you will see a confirmation message that will include a link to view your request.

Request Submitted

Current Phase	150K-Assignment Phase
Agency	Administration, Dept Of
Contact	Jessica Vieira
Contact Phone	6082665452
Contact Email	DOAWisPro@wisconsin.gov
Description	Telecom services
Request Status	View Request

Clicking **View Request** will take you to the same page as searching for the request by clicking the **150K Search** tab at the top of the page.

- **Notes:** This tab allows you to include extra information not already covered within the other tabs. Enter your text into the **New Note** box and click **+ Add** to save the note.

Draft 150K Request

Request Vendors 1 Prior Years 1 Estimates 1 Documents 2 Finish **Notes 2** Print

Request Notes.

New Note

Required

+ Add

07/02/18 03:02 PM **Jessica Vieira**

There is no delete button for your notes.

Notice there is no button to delete an entered note.

- Print:** The **Print** tab allows you to print a copy of your request as well as any documents you have uploaded to the system, and the draft of the approval letter that will be built as the request moves through the different phases of the system. To open any of the documents, click the **file name** on the left and click **Open**. You may then print the document or save it to your computer.

Document	Type
150K-100051.pdf	Printable Request
ApprovalLetter.100051.pdf	Approval Letter
CBA.pdf	CBA_CA
Request Form DOA 3310.pdf	Request_Form_DOA_3310

Do you want to open or save **150K-100051.pdf** (36.9 KB) from **rpauat.wi.gov**? **Open** Save Cancel

SEARCHING FOR REQUESTS

- STEP 1:** Navigate to the 150K System homepage. Click the **Search Requests** tab at the top of the page.

Home **150K Search** 150K New 150K Drafts 150K Approve Users Stats Help Log Out

View 150K Request

Agency: --All-- 150K Number: Phase: --All-- Created After: 01/03/2018 Created Before: 07/03/2018

Flags:
 IT
 Private Consultant
 Rush

Administration, Dept Of 150K-Revision 150K Number 100052 Created 07/02/2018 11:46 AM Description Private Consultant services test	Administration, Dept Of 150K-Assignment Phase 150K Number 100051 Created 07/02/2018 11:20 AM Description Telecom services	Administration, Dept Of 150K-Secretary's Office 150K Number 100047 Created 06/29/2018 04:21 PM Description Consulting for Marketing IT Services
--	--	--

- **STEP 2:** Enter your search criteria. Select the filters you wish to use.
 - **Agency:** Your search results will default to your agency and you will only be able to see requests submitted by your agency or agencies you have access to.
 - **150K Number:** Once a request has been submitted, it is automatically assigned a 6-digit 150K Number.
 - **Phase:** As a request progresses, it moves through different phases. Each phase may approve the request to move it to the next phase, deny the request and stop its progression, or may send it back to the agency for revision and resubmittal.
 - **Created After and Created Before:** You may search for a request submitted before and/or after a particular date.
 - **Flags:** You can filter the search results by the flags associated with the request, either IT (which appear in green squares) or Private Consultant (which appear in blue squares), or if it was marked as Rush in the Assignment Phase.
- **STEP 3:** Open the request by clicking anywhere within its square.
 - **Request:** This tab will provide an overview of the information entered into the main form for the request. It also shows the automatically assigned **150K Number** and the current **Phase** the request is in.

View 150K Request

Request Vendors 1 Prior Years 1 Estimates 1 Documents 4 Notes 2 Progress History

Agency	Administration, Dept Of
150K Number	100051
Phase	150K-Assignment Phase
Created	07/02/2018 11:20 AM
Contact	Jessica Vieira
Contact Phone	6082665452
Contact Email	DOAWisPro@wisconsin.gov
Flags	Request for Information Technology Services
IT Purchase	true
IT Sub-Category List	• Telecom
Private Consultant	false
Renewal	false
Rush	false
Procurement Auth...	Enterprise Contract
Contract Term	1 Year
Funding	GPR - General Purpose Revenue
Amendment	false
Description	Telecom services
NIGP Codes	28029 Communications/Telecommunications Cable and Wire

- **Vendors:** This tab shows the information for any vendor entered in the request.

- **Prior Years:** This tab displays information about requests entered in previous years. If no prior year information was entered, this tab will not display.
- **Estimates:** This tab displays cost estimates for all years that were provided.
- **Documents:** This tab shows a list of documents uploaded with this request as well as a printable version of the request itself. All documents may be downloaded or printed.
- **Notes:** This tab displays any notes that have been added to the request. If no notes have been added, this tab will not display.
- **Progress:** This tab lists all the stages of approval that the request must complete to be successful. The stage the request is currently in will be highlighted and will list **Current Phase** to the right of it. Necessary phases depend on the type of request (e.g., IT requests must also be approved by DET). Additionally, a request may be sent back to the **150K Revision Phase** if more information is required before it can be approved. Once it passes through the **150K Revision Phase**, it will bypass the **Receiving** phase.

View 150K Request

Request Vendors **1** Prior Years **1** Estimates **1** Documents **4** Notes **2** **Progress** History

0	150K-Agency Draft
1	150K-Revision
2	150K-Assignment Phase Current Phase
3	150K-SBOP Analysis
4	150K-SBOP Approval
5	150K-DET Analysis
6	150K-DET Approval
7	150K-SBO Analysis
8	150K-SBO Approval
9	150K-Secretary's Office
10	150K-Approved
11	150K-Denied
12	150K-Withdrawn

Only requests for IT services will include the DET Analysis and Approval phases.

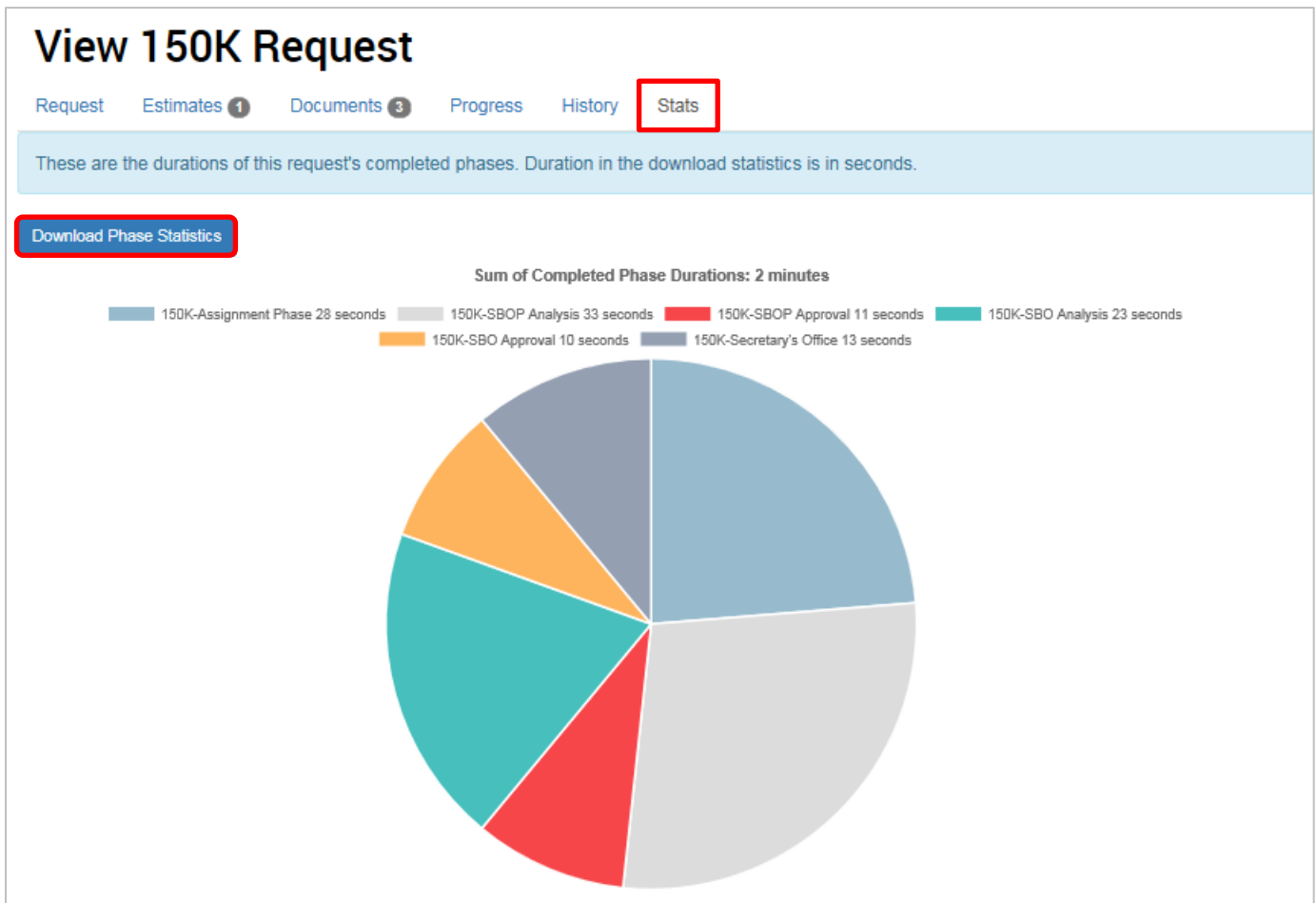
- **History:** This tab shows a list of everyone who has interacted with the request through the system. For each interaction, it will list the date and time, the person’s name, the phase the request was in during the interaction, and the action (“event”) that was completed.

View 150K Request

Request Vendors **1** Estimates **3** Documents **3** Progress **History** Stats

Time	User	Phase	Event
06/26/18 12:14	Vieira, Jessica	150K-Agency Draft	Submit
06/26/18 12:14	Vieira, Jessica	150K-Assignment Phase	In Queue
06/28/18 09:55	McCrary, Charles	150K-Assignment Phase	Approve
06/28/18 09:55	McCrary, Charles	150K-SBOP Analysis	In Queue
06/28/18 09:56	McCrary, Charles	150K-SBOP Analysis	Approve

- **Stats:** Once the request moves through the Assignment Phase, the **Stats** tab will become available and will show a pie chart of the amount of time the request has spent in each phase. Users can download this information using the **Download Phase Statistics** button.

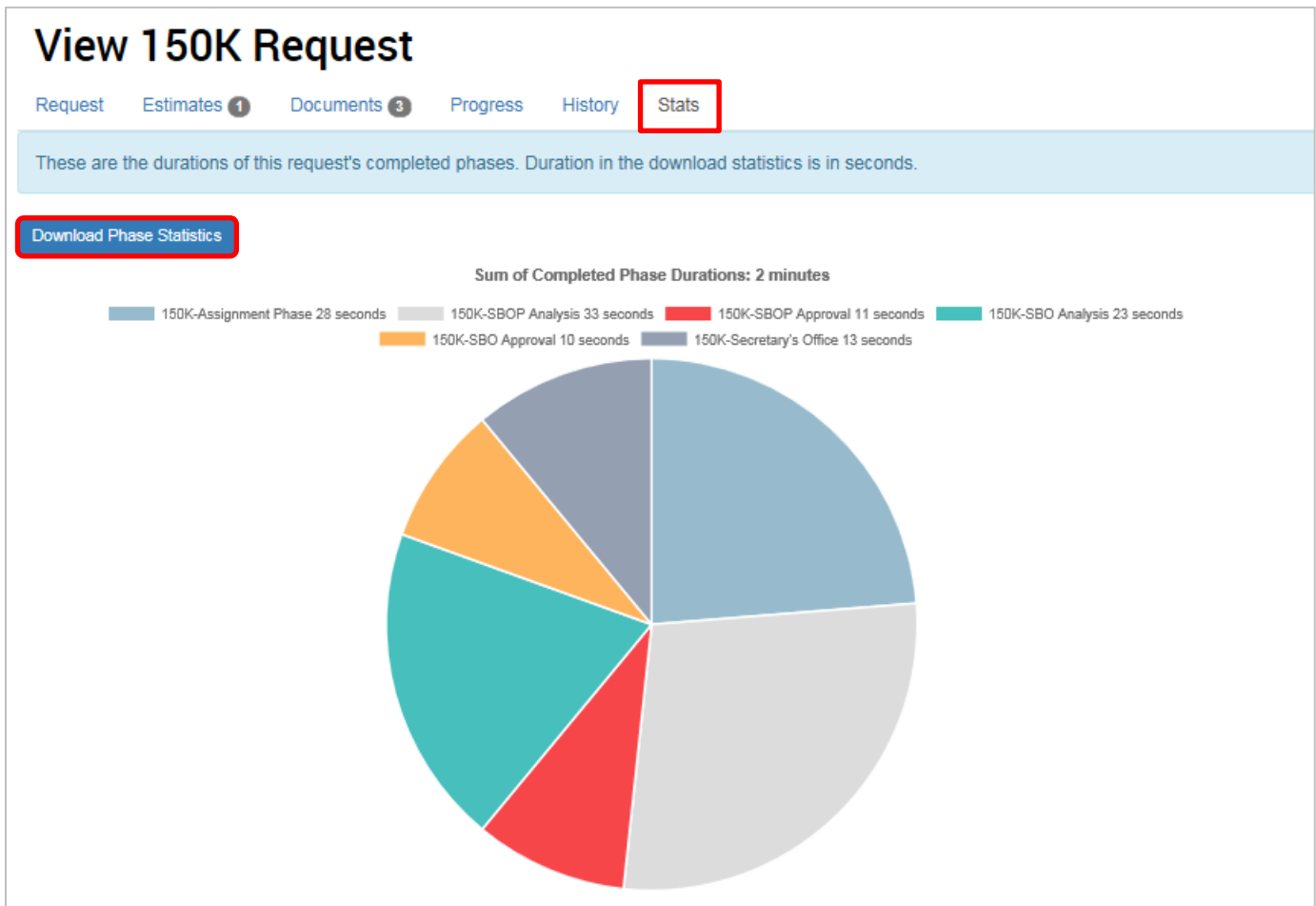


CHARTS & GRAPHS

Statistics may be generated to show the average time requests spend in each of the approval phases. This data may be generated for an individual request or for all requests as a whole or by phase.

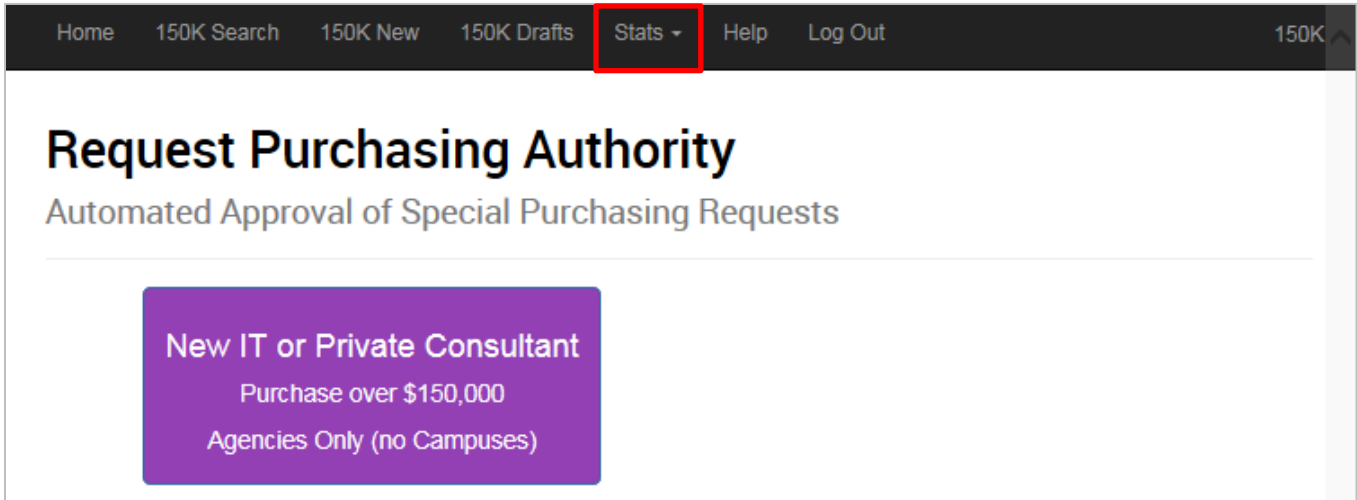
Stats for an Individual Request

- **STEP 1:** Navigate to the 150K System homepage. Click the **Search Requests** tab at the top of the page.
- **STEP 2:** Search for and click on the desired request (must be past the Assignment Phase for the Stats tab to be accessible). For step-by-step instructions for this task, see the **Searching for Requests** section.
- **STEP 3:** Click on the **Stats** tab. You may download this information to your computer by clicking the **Download Phase Statistics** button.

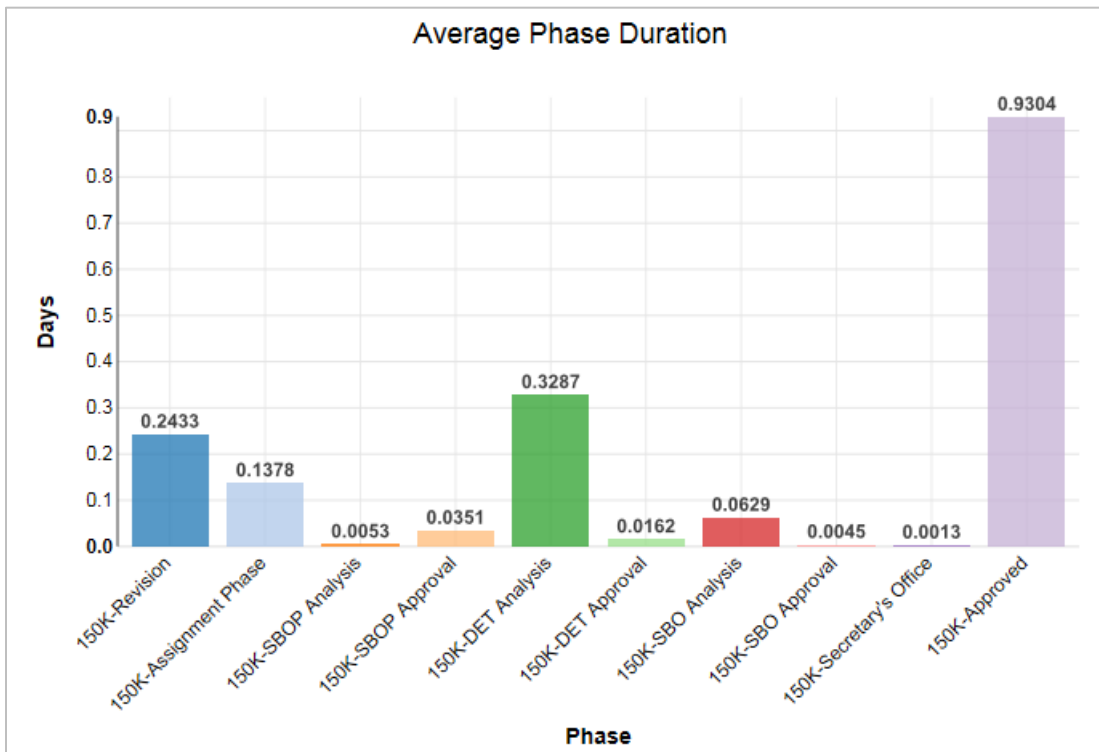


Stats for All Requests

- **STEP 1:** Navigate to the 150K System homepage. Click the **Stats** tab at the top of the page and select **150K Average Phase Duration** from the dropdown menu.



Once selected, you will be shown a bar graph displaying the average length of time requests spend in each phase.



- **STEP 2:** Limit statistics to specific phases. At the bottom of the graph, you are able to filter the results by phase. Click the **None Selected** button to view the phase filters. Select as many of the phases as you would like and click **Refresh**.

The screenshot shows a user interface for filtering 150K System requests. At the top, there are two buttons: "Download Phase Statistics" and "Refresh". Below these is the heading "Limit statistics to requests currently in phase(s):". A dropdown menu is set to "None Selected". Below the dropdown are two buttons: "Select All" and "Select None", and a "Reset" button. A search bar is also present. The main area contains a list of 12 phase names arranged in three columns:

150K-Agency Draft	150K-Revision	150K-Assignment Phase
150K-SBOP Analysis	150K-SBOP Approval	150K-DET Analysis
150K-DET Approval	150K-SBO Analysis	150K-SBO Approval
150K-Secretary's Office	150K-Approved	150K-Denied
150K-Withdrawn		

This will show a bar graph displaying the average length of time 150 System requests spend in each phase. If desired, you can further filter the results to only include specific phases using the steps above. Click **Download Phase Statistics** to save or print an Excel sheet of the results.

A close-up of the two buttons at the top of the interface: "Download Phase Statistics" and "Refresh".